

STRATEGIC REVIEW 2022

CANADA'S ENGAGED UNIVERSITY

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Simon Fraser
University respectfully
acknowledges
the x^wməθk^wəy̓əm
(Musqueam),
Sk̓wx̓wú7mesh
Úxwumixw
(Squamish),
səlílŵətaʔt̓ (Tsleil-
Waututh), q̓ícəy̓
(Katzie), k^wik^wəł̓əm
(Kwkwetlem),
Qayqayt, Kwantlen,
Semiahmoo, and
Tsawwassen peoples
on whose unceded
traditional territories
our three campuses
reside.

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1 INTRODUCTION

SFU's Strategic Review demonstrates the university's commitment to vision/mission fulfillment, measured through specific outcomes and indicators of achievement that are applied to each of the university's three core themes and fundamental theme. SFU regards the degree of vision/mission fulfillment as the extent to which the university's clearly articulated purpose and intentions are being achieved. However, the major upheaval caused by COVID-19, which included having to pivot from face-to-face teaching and learning to operating remotely and then pivoting back again, created substantial challenges for SFU. Certain

indicators may not accurately reflect the effort and actions pursued to achieve objectives because the targets stemmed from the pre-COVID period. For this reason, the Strategic Review will include mention of progress made on the implementation of the three high-level university plans and the Institutional Accountability Plan and Report's assessment of the institution's performance in achieving the Ministry of Advanced Education and Skills Training objectives. In this way, this Strategic Review report will provide substantive evidence that SFU is accomplishing its main objectives.



2 PURPOSE

This report is an overarching document that summarizes SFU's fulfillment of its vision/mission and the provincial mandate.

Specific objectives have been articulated for each of the university's three core themes, **Engaging Students**, **Engaging Research**, and **Engaging Communities**, and the fundamental theme, **Leveraging Institutional Strength**. All are documented in the [University Planning Framework \(UPF\)](#). Indicators of achievement have been identified for each objective. In this review, each indicator has been analyzed and assessed. All indicators are then summarized and used to assess whether or not the core theme they are associated with is fulfilling the university's vision/mission. In the 2018 Strategic Review, the university assigned targets or "target bands" for each indicator for 2021, wherever possible. The results are included in this report.

The SFU **Academic Plan**, **Strategic Research Plan**, and **Strategic Community Engagement Plan** are all vitally important to SFU's Planning Framework and support the achievement of the objectives identified in the Planning Framework. The determination of the progress being made in the implementation of each of these plans has been included in this review to provide additional context.

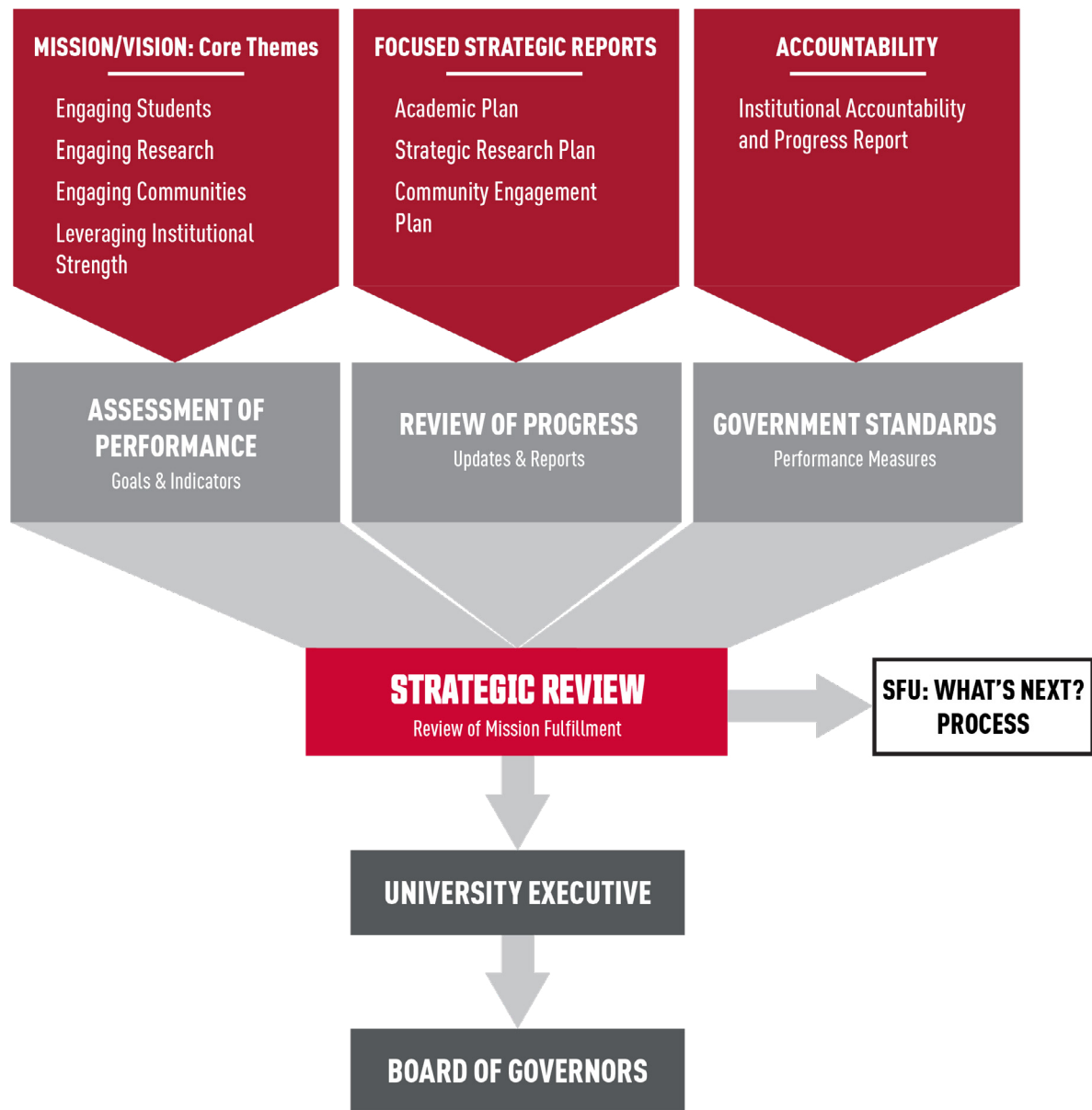
Also, of major importance is the



[Institutional Accountability Plan and Report \(IAPR\)](#), which is required annually by the British Columbia Ministry of Advanced Education Skills and Training. The reporting processes and requirements of the IAPR, like the various individual strategic plans, also have an impact on the SFU Planning Framework. The Ministry has nine indicators that SFU reports on.

Currently, the Office of the President is leading a new strategic planning process,

2.1: Strategic Review Process



[SFU: What's Next?](#), which is highly consultative and includes soliciting input from all SFU communities. This process may result in an update or an entire redirection of the institution's approach

to strategic planning, the associated objectives, and the identified indicators. This process is expected to deliver a final outcome in early 2023.

3 STRATEGIC VISION & MISSION

Following an extensive consultation process within and beyond the university, the SFU vision/mission was launched in February 2012. The vision/mission, which focuses on SFU's strengths and aspirations as an "engaged university," represents the culmination of a year-long consultation process that included thousands of students and community members and hundreds of SFU faculty, staff, and alumni. The vision/mission was reaffirmed in June 2016.

The full details of the SFU vision/mission can be found online [here](#).

In 2017, Simon Fraser University invited the SFU community to reflect on the impact of its vision/mission and to provide feedback on progress in realizing its goals.

Similar to the initial consultations that launched the vision/mission in 2012, SFU invited community members to share their feedback in meetings and forum events, on social media, and through its website, asking the following three key questions:

1. How is the university community fulfilling its vision and achieving its goals for engaging students, engaging research, and engaging communities?
2. How can the university community improve its existing programs, initiatives, and activities to further its vision?
3. What new opportunities should the university community consider?

SFU'S VISION & MISSION

To be the leading engaged university defined by its dynamic integration of innovative education, cutting-edge research, and far-reaching community engagement.

Engaging Students

To equip students with the knowledge, skills, and experiences that prepare them for life in an ever-changing and challenging world.

Engaging Research

To be a world leader in knowledge mobilization building on a strong foundation of fundamental research.

Engaging Communities

To be Canada's most community-engaged research university.

The engagement process offered suggestions on how the vision/mission could be enhanced and improved upon. The process and its results, as well as an update on initiatives currently underway, were published in spring 2018, [Engaging the Vision: Community Consultation Report](#).

As mentioned, the university is currently in the midst of the [SFU: What's Next?](#) Initiative, which is a cross-university collaboration to determine the new vision of the university.



4 UNIVERSITY PLANNING FRAMEWORK



The University Planning Framework is the result of a consultative administration process derived from the vision/mission. The Framework informs future initiatives, allocation of resources, and measurements of success. It guides all institutional planning activities and includes mechanisms for monitoring progress and achievements. As a dynamic document that reflects the university response to its changing environment, it is updated regularly.

The Planning Wheel illustrates how all operational plans integrate to form the University Planning Framework. The Academic Plan, Strategic Research Plan, and Strategic Community Engagement Plan, which represent core theme planning, form the main linkages between the vision/mission and the Faculty plans, departmental plans, and functional plans. All plans are constrained by the two outer circles—Financial Model and Governance Model.

4.1: Planning Wheel



Importance of the University Planning Framework to the Strategic Review

Not only does the University Planning Framework, and its corresponding strategic plans, guide all educational and administrative planning for SFU, but it also forms the foundation for all the following

performance indicators of achievement, which provide SFU with quantitative support to assess vision/mission fulfillment.

5 PERFORMANCE REFLECTED BY SFU PLANNING FRAMEWORK INDICATORS

For each of the core themes, the data are provided in the form of a table and a graph that show performance over a five-year period, with 2017/18 as the base year where applicable. This is followed by a brief discussion on performance and recommendations, and then a conclusion is drawn as to whether expectations and targets have been met.



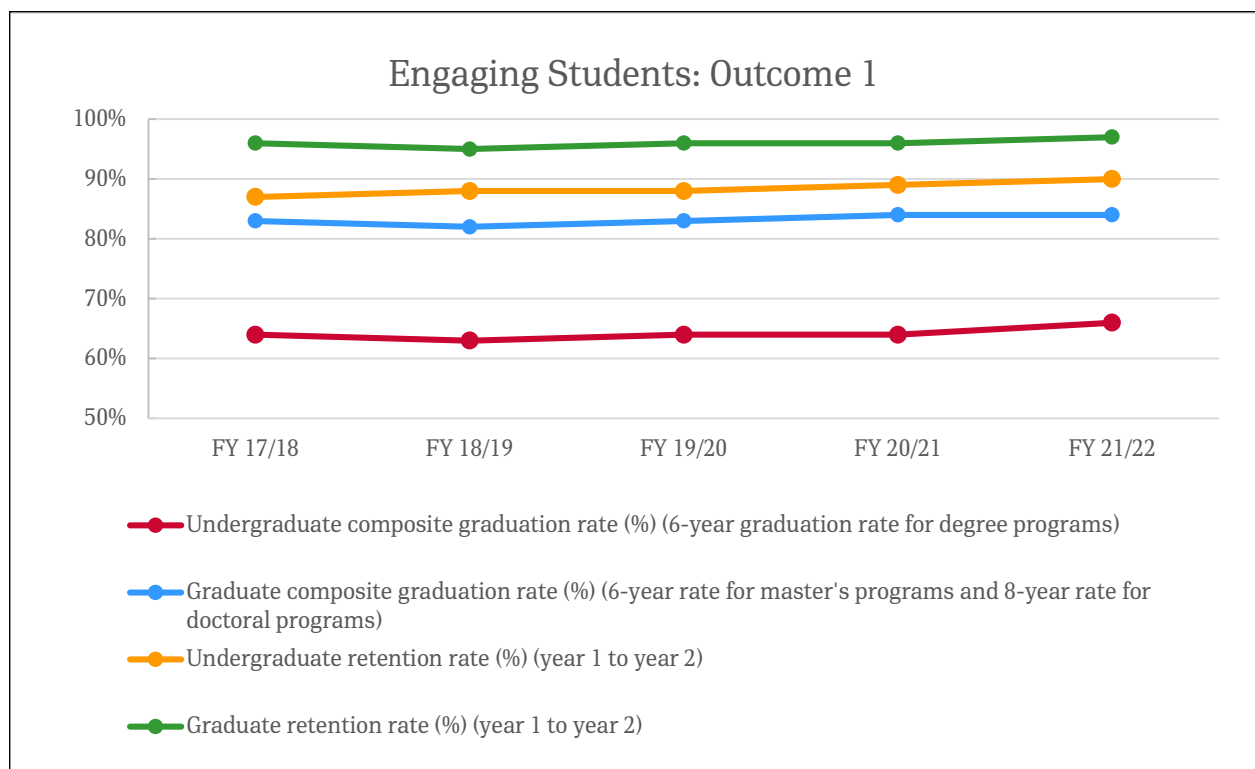
5.1 CORE THEME: ENGAGING STUDENTS

Goal: To equip students with the knowledge, skills, and experiences that prepare them for life in an ever-changing and challenging world.

Outcome 1 - Students Gain the Knowledge to Complete Degree Requirements

Indicators		FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	Assessment			Target for 2021
							Below Expectations	Meets Expectations	Exceeds Expectations	
1.1	Undergraduate composite graduation rate (%) (6-year graduation rate for degree programs)	64.0%	63.0%	64.0%	64.0%	66.0%			✓	64.0%
1.2	Graduate composite graduation rate (%) (6-year for master's programs, and 8-year for doctoral programs)	83.0%	82.0%	83.0%	84.0%	84.0%	✓			85.0%
1.3	Undergraduate retention rate (%) (year 1 to year 2)	87.0%	88.0%	88.0%	89.0%	90.0%			✓	87.0%
1.4	Graduate retention rate (%) (year 1 to year 2)	96.0%	95.0%	96.0%	96.0%	97.0%			✓	96.0%

5.1: Engaging Students, Outcome 1



5.2: Engaging Students, Outcome 1

Indicators 1.1 to 1.4 – Graduation and Retention Rates

The composite graduation rate for both undergraduate and graduate students has remained relatively stable since 2017/18. Although there was an increase in the graduation rate for undergraduates in 2021/22, it was likely an effect of the pandemic. The average credit load of undergraduates increased during the pandemic period, in part because other activities, including co-operative education, were generally less available to students. SFU's undergraduate composite graduation rate is over a six-year time frame as many students take advantage of the co-operative education and field school opportunities that SFU normally offers, which extends the time to completion beyond the traditional four years. While SFU is keen to ensure timely credential completion, it sees the importance of students being able to graduate with the real-world work experience that its various integrated learning programs offer.

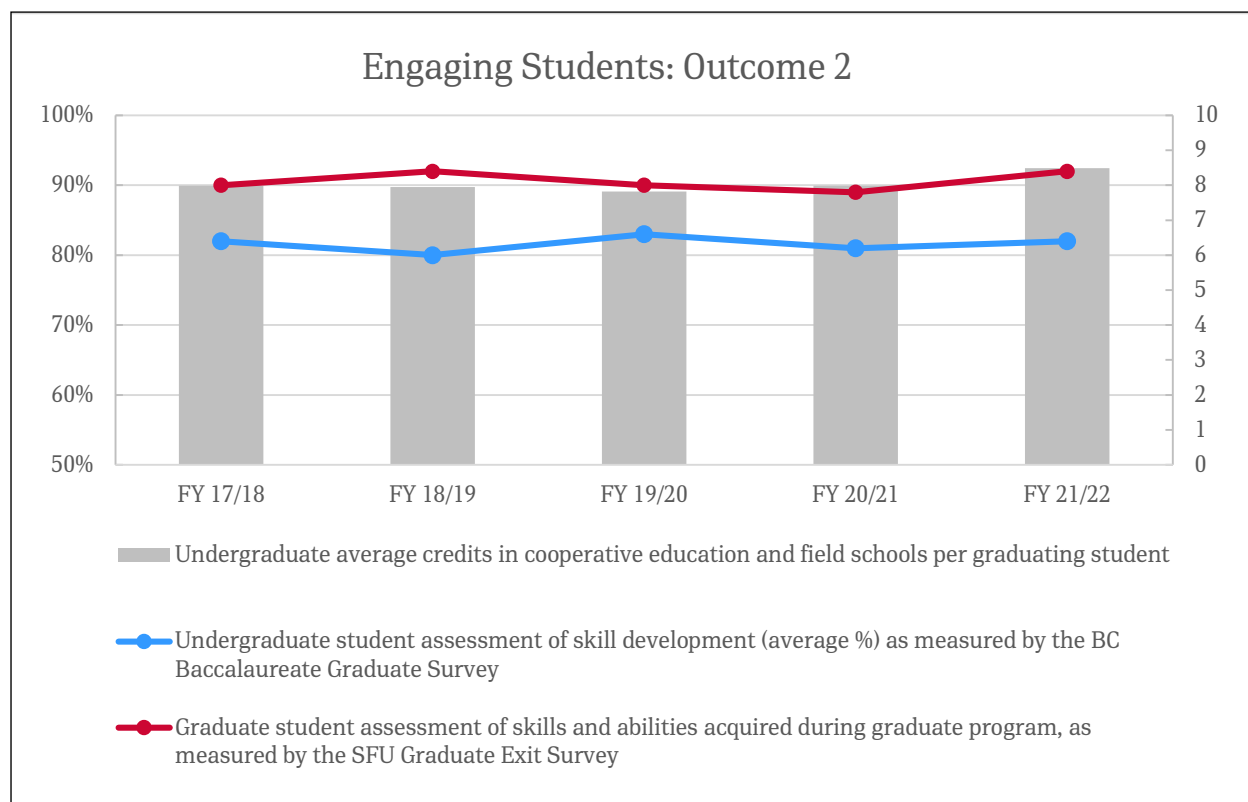
Retention rates at both the graduate and undergraduate levels are strong and are maintaining a consistently high level year-over-year. The increase in undergraduate retention rates seen in the last two years is likely attributable to changes made to grading and academic standing policies during the pandemic that have now been reversed.



Outcome 2 - Students Acquire Skills Necessary in an Ever-Changing and Challenging World

Indicators		FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	Assessment			Target for 2021
							Below Expectations	Meets Expectations	Exceeds Expectations	
2.1	Undergraduate average credits in co-operative education and field schools per graduating student	7.99	7.95	7.82	7.99	8.49			✓	8.00
2.2	Undergraduate student assessment of skill development (average %), as measured by the BC Baccalaureate Graduate Survey	82.0%	80.0%	83.0%	81.0%	82.0%		✓		82.0%
2.3	Graduate student assessment of skills and abilities acquired during graduate program, as measured by the SFU Graduate Exit Survey	90.0%	92.0%	90.0%	89.0%	92.0%			✓	90.0%

5.3: Engaging Students, Outcome 2



5.4: Engaging Students, Outcome 2

Indicator 2.1 – Undergraduate Average Credits in Experiential Learning (Co-op and Field Schools) per Graduating Student

During the early period of the pandemic when both in-person learning and international travel were limited, opportunities for students to participate in co-operative education and field schools were diminished, resulting in a further decrease in this indicator from previous years. As pandemic restrictions began to ease, a greater number of students chose to take up deferred co-op work terms. In addition, more co-op positions were temporarily made available through the influx of incentive funding from the Canadian federal government. These factors combined to create an increase in this indicator seen in 2021/22.



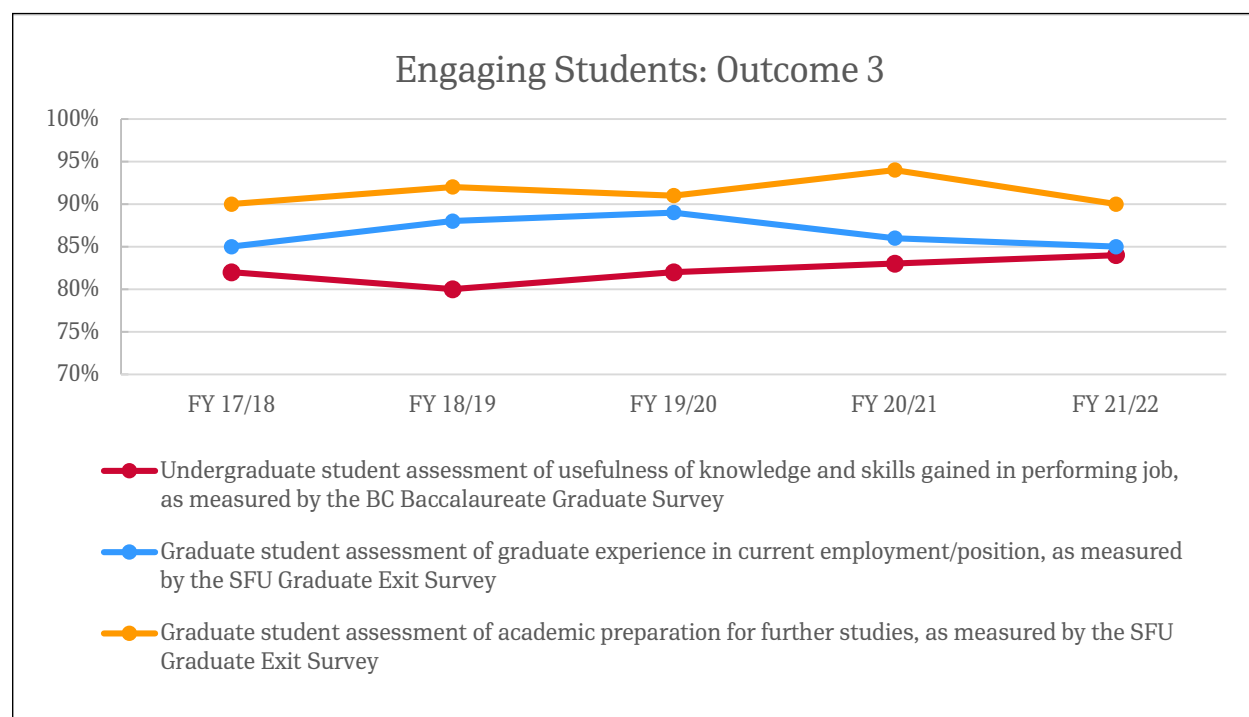
Indicators 2.2 and 2.3 – Undergraduate and Graduate Student Assessment of Skill Development and Abilities Acquired

National, provincial, and SFU's own student surveys indicate that students are strongly satisfied with their education experience at SFU. Although there are slight fluctuations over the five-year period measured, the data show that SFU is maintaining a high level of student satisfaction with the skills they are acquiring, particularly at the graduate level.

Outcome 3 - Students Apply Knowledge in the Workplace or Further Studies

Indicators		FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	Assessment			Target for 2021
							Below Expectations	Meets Expectations	Exceeds Expectations	
3.1	Undergraduate student assessment of usefulness of knowledge and skills gained in performing job, as measured by the BC Baccalaureate Graduate Survey	82.0%	80.0%	82.0%	83.0%	84.0%			✓	82.0%
3.2	Graduate student assessment of graduate experience in current employment/position, as measured by the SFU Graduate Exit Survey	85.0%	88.0%	89.0%	86.0%	85.0%	✓			87.0%
3.3	Graduate student assessment of academic preparation for further studies, as measured by the SFU Graduate Exit Survey	90.0%	92.0%	91.0%	94.0%	90.0%		✓		90.0%

5.5: Engaging Students, Outcome 3



5.6: Engaging Students, Outcome 3

Indicators 3.1 and 3.2 – Undergraduate and Graduate Student Assessment of Usefulness of Knowledge and Skills Gained in Performing Job

National, provincial, and SFU's own surveys indicate that a high percentage of students have found their education at SFU to be either useful or somewhat useful in their work or employment. In the most recent [British Columbia Outcomes Survey of Baccalaureate Graduates \(2021\)](#), skills associated with analysis and critical thinking were rated the highest, with 92.0% of SFU graduates surveyed claiming they acquired these skills at SFU. Independent learning (89.0%), reading and comprehending material (87.0%), and writing clearly and concisely (85.0%) were also highly rated.

Indicator 3.3 – Undergraduate Student Assessment of Academic Preparation for Further Studies

National, provincial, and SFU's own surveys indicate that students feel well prepared to undertake further academic studies. Similar to the results showing that students felt the oral communication and group collaboration skills learned at SFU helped them in work settings, the results from the British Columbia Outcomes Survey of Baccalaureate Graduates show that students feel these same skills are also preparing them for further academic studies.



Conclusion - Engaging Students

Overall, SFU is achieving satisfactory progress on its core theme of Engaging Students. In addition to the information collected related to SFU's indicators, there is considerable evidence from institutional, provincial, and national surveys to substantiate the claim. Given that the majority of the indicators are high, have remained relatively stable over the measured five-year period, and have hit their 2021 targets, SFU is confident in stating that it is achieving the goal for this core theme.

5.2 CORE THEME: ENGAGING RESEARCH

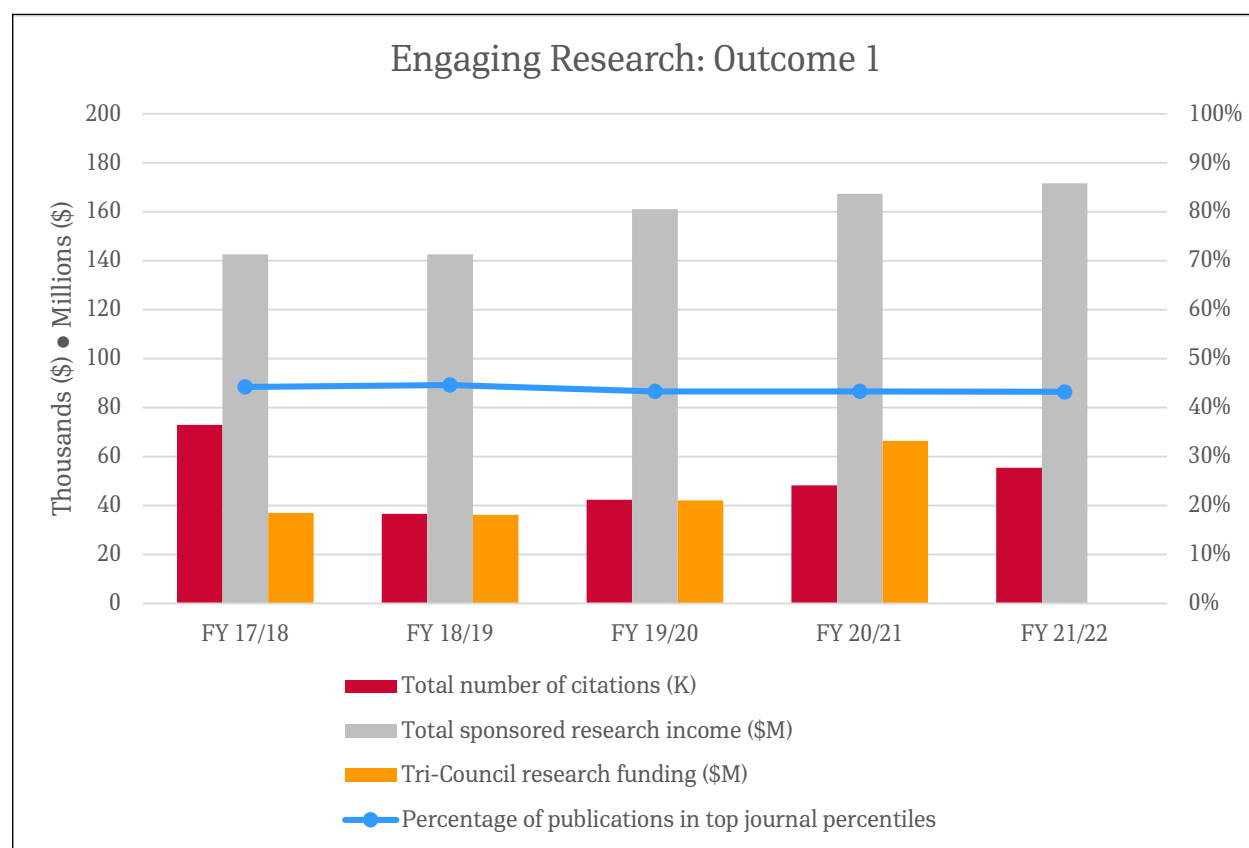
Goal: To be a world leader in knowledge mobilization building on a strong foundation of fundamental research.

Outcome 1 - Research is at a High Quality Level

Indicators		FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	Assessment			Target for 2021
							Below Expectations	Meets Expectations	Exceeds Expectations	
1.1	Total number of citations (K)	72,950	36,612	42,311	48,224	55,338			✓	44,000
1.2	Percentage of publications in top journal percentiles	44.2%	44.6%	43.3%	43.3%	43.2%			✓	42.0%
1.3	Tri-Council research funding (\$M)	\$36.9M	\$36.2M	\$42.0M	\$66.4M	not available yet				n/a*
1.4	Total sponsored research income (\$M)	\$142.6M	\$142.6M	\$161.0M	\$167.3M	\$171.6M			✓	\$145.0M

* The 2018 Engaging Research Theme Team recommends removing this indicator.

5.7: Engaging Research, Outcome 1



5.8: Engaging Research, Outcome 1

Indicator 1.1 – Total Number of Citations

It is standard practice by world university ranking systems, peer-reviewed journals, and for bibliometrics in general to rely on the total number of citations for research publications as a measure of research impact. In the latest [QS World University Rankings \(2023\)](#), SFU ranks #9 in Canada and #244 (out of 1422 institutions) in the world for its number of citations per faculty. SFU consistently ranks among Canada's top research universities for research impact in various ranking systems, including Times Higher Education, ReSearch Infosource, and Maclean's.

Indicator 1.2 – Percentage of Publications in Top Journal Percentiles

In addition to count of citations, which is used as the primary indicator of research impact, quality of scientific research and scholarship can also be captured by the quality, reputation, and competitiveness of the journals in which the articles are published. For this indicator, the university monitors the percentage of SFU articles published within the top 10.0% of journals in fields where SFU research is active. Additionally, SFU compares this ratio to national, North American, and European averages.

Indicator 1.3 – Tri-Council Research Funding

In Canada, the Tri-Council agencies are the core source of operating funding for research at the federal level and account for approximately one third of total research funding in Canada. However, as the federal budget for Tri-Council agencies has mostly remained flat, there is little room for growth for research income from these sources alone, which is why no target has been set for this indicator. Currently, the indicator is being reviewed and may be removed.

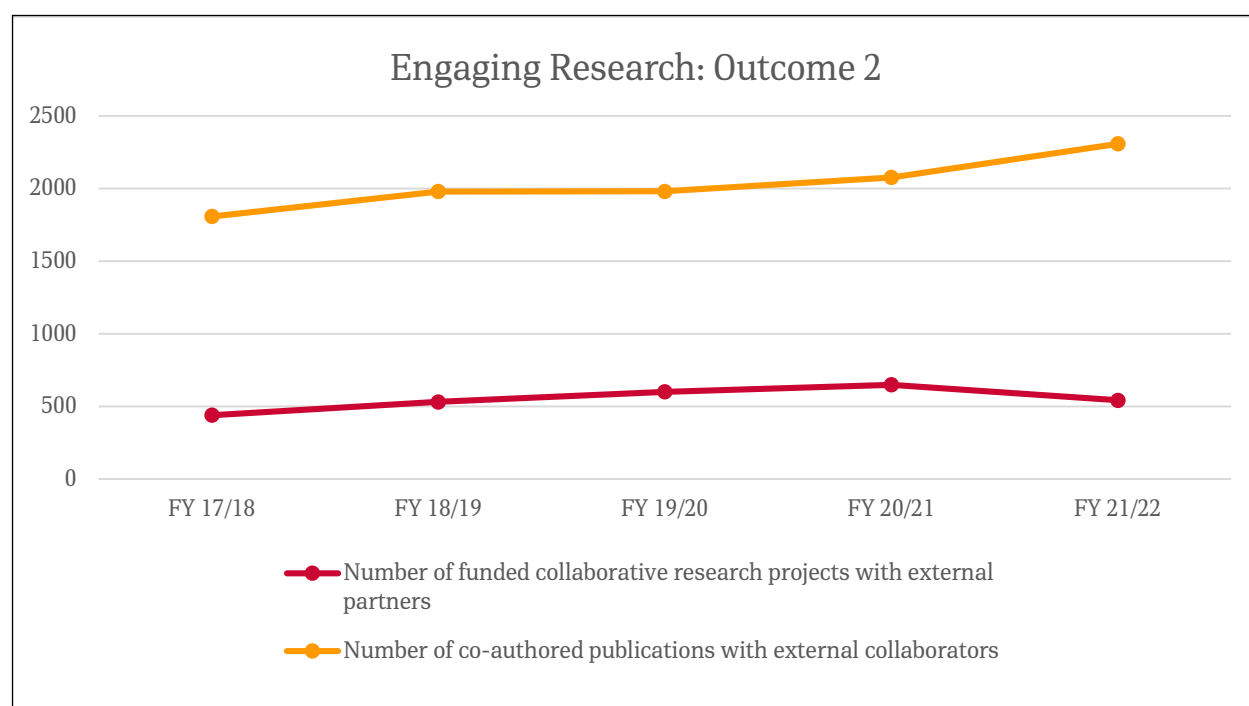
Indicator 1.4 – Total Sponsored Research Income

The amount of sponsored research income is a more representative measure of the university's growing research enterprise than Tri-Council research funding. In recent years, the university has enhanced its capacity in research in partnership with government, industrial, and non-profit organizations, leading to the expansion of its research infrastructure and improved resources and services for researchers. This has led to higher gains in the quality of research output with broader social and economic impact. This growth is reflected by a 20.0% increase in total sponsored research income since the 2019/20 fiscal year, reaching \$171.6m in 2021/22.

Outcome 2 - Research is Mobilized Through Partnerships/Collaborations with External Partners

Indicators		FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	Assessment			Target for 2021
							Below Expectations	Meets Expectations	Exceeds Expectations	
2.1	Number of funded collaborative research projects with external partners	440	531	601	649	542			✓	450
2.2	Number of co-authored publications with external collaborators	1,807	1,979	1,980	2,076	2,307			✓	1,800

5.9: Engaging Research, Outcome 2



5.10: Engaging Research, Outcome 2

Indicator 2.1 – Number of Funded Collaborative Research Projects with External Partners

Over the past year, SFU was successful in leading a new research project through the Canada Foundation for Innovation's (CFI) Innovation Fund program, with a total project cost of \$2.2 million. From 2018 to 2021, SFU has led 53 projects through CFI funds, with total project costs of \$32.8 million, ranking thirteenth in Canada and second in BC by total size of the award. Over the past four years, SFU has seen an increasing trend in its number of research partnerships and has been engaging the broader community with a high number of collaborations each year.

Indicator 2.2 – Number of Co-Authored Publications with External Collaborators

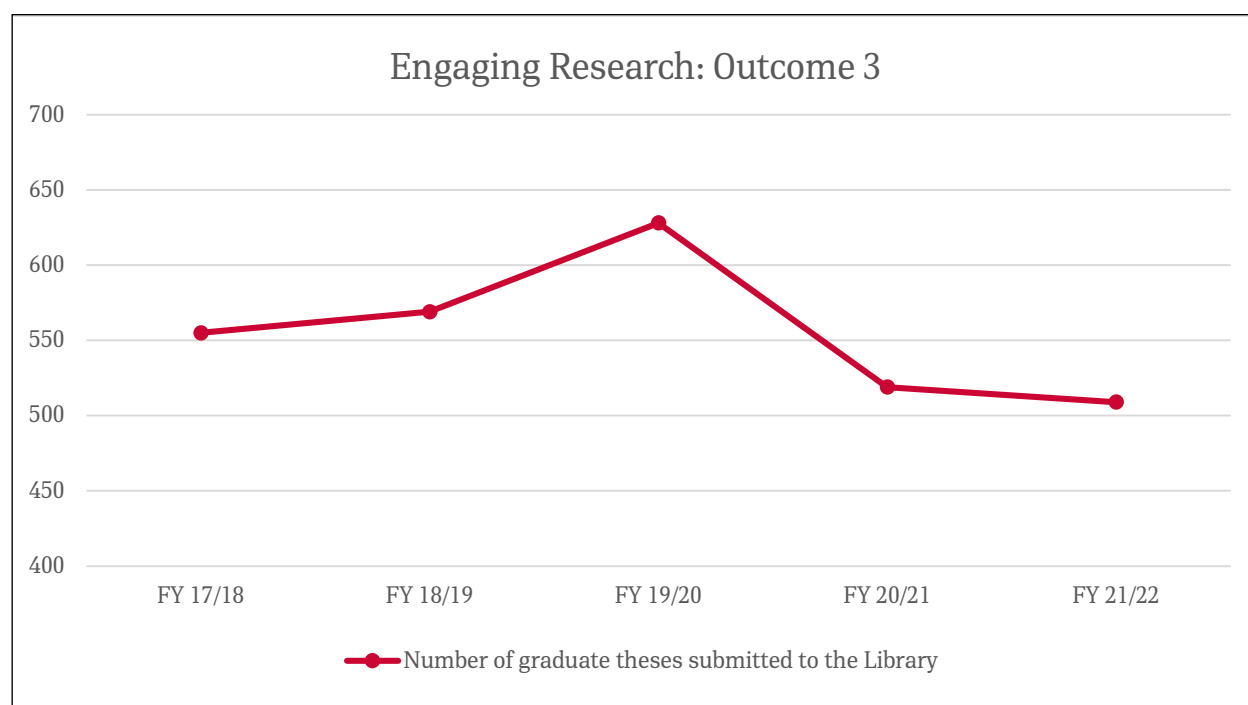
This indicator is an amalgamation of the number of publications in which an SFU researcher has at least one co-author from an external organization outside of Canada (international), in Canada (national), or with a corporate organization (academic-corporate). This trend is steadily rising, which shows SFU to be an institution that actively seeks collaboration around the globe.



Outcome 3 - Research is Integrated into Teaching and Learning

Indicators		FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	Assessment			Target for 2021
							Below Expectations	Meets Expectations	Exceeds Expectations	
3.1	Number of graduate theses submitted to the Library	555	569	628	519	509	✓			580

5.11: Engaging Research, Outcome 3



5.12: Engaging Research, Outcome 3

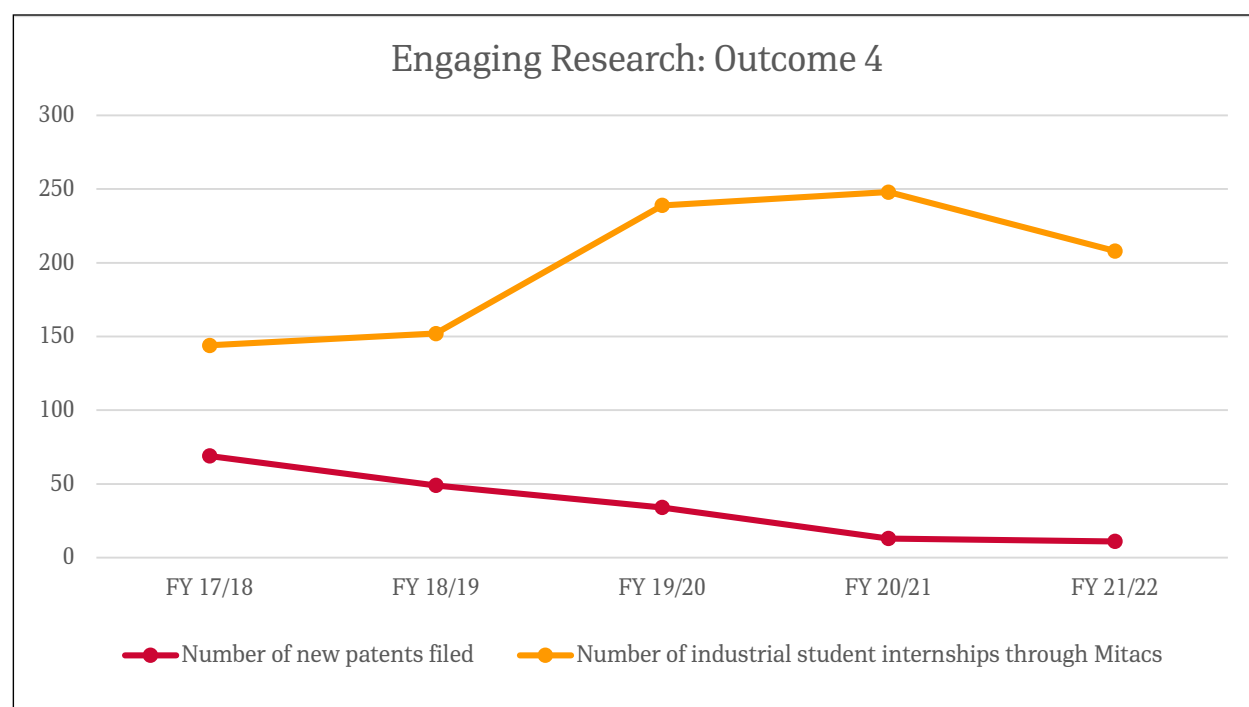
Indicator 3.1 – Number of Graduate Theses Submitted to the Library

This indicator is intended to show the level of graduate student engagement in research at SFU. Since SFU graduate programs incorporate research training at every degree level, both doctoral and master's level theses are included in this measurement. During 2021 and 2022, SFU, along with everyone else, was impacted by the COVID-19 pandemic. With many things moving to a digital environment for approximately two years, it likely slowed down the research for some graduate students which in turn possibly led to fewer theses being submitted during this time.

Outcome 4 - Research Investment is Leveraged to Drive Innovation and Transfer of Technology for the Benefit of Society and the Economy

Indicators	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	Assessment			Target for 2021
						Below Expectations	Meets Expectations	Exceeds Expectations	
4.1 Number of new patents filed	69	49	34	13	11	✓			50
4.2 Number of industrial student internships through Mitacs	144	152	239	248	208			✓	140

5.13: Engaging Research, Outcome 4



5.14: Engaging Research, Outcome 4

Indicator 4.1 – Number of New Patents Filed

This indicator provides the number of new patents filed each year through the [Technology Licensing Office](#) (formerly known as the Industry Engagement Office). Given that SFU's creator-owned [Intellectual Property Policy](#) does not require all inventions to be managed by the technology transfer office, these numbers may not represent all patents filed by SFU researchers. However, the data is still indicative of an overall innovation activity trend and provides an accurate heuristic for SFU intellectual property filings.

Indicator 4.2 – Number of Industrial Student Internships through Mitacs

[Mitacs](#) is a national not-for-profit organization that supports research internships across academia and industry, with the goal of facilitating innovation in Canada. Mitacs internships are intended for graduate students and postdoctoral fellows and are, in effect, a partnership between the university and industry.

Overall, the value of Mitacs awards has increased since 2018/19, which is a sign of the success for both Mitacs and SFU graduate programs. As suggested by this indicator, SFU graduate programs are supporting innovation in research through Mitacs partnerships, with an expectation for incremental increase.



Conclusion - Engaging Research

As evident by the research indicators, SFU researchers continue to substantially meet institutional expectations on research quality, research training, external collaborations, and social and technological innovation. SFU ranked the #1 Canadian Innovative University by World Universities with Real Impact in 2022 and #8 in the world for Impact on Sustainable Cities and Communities by the [Times Higher Education in 2022](#) (#3 in Canada).

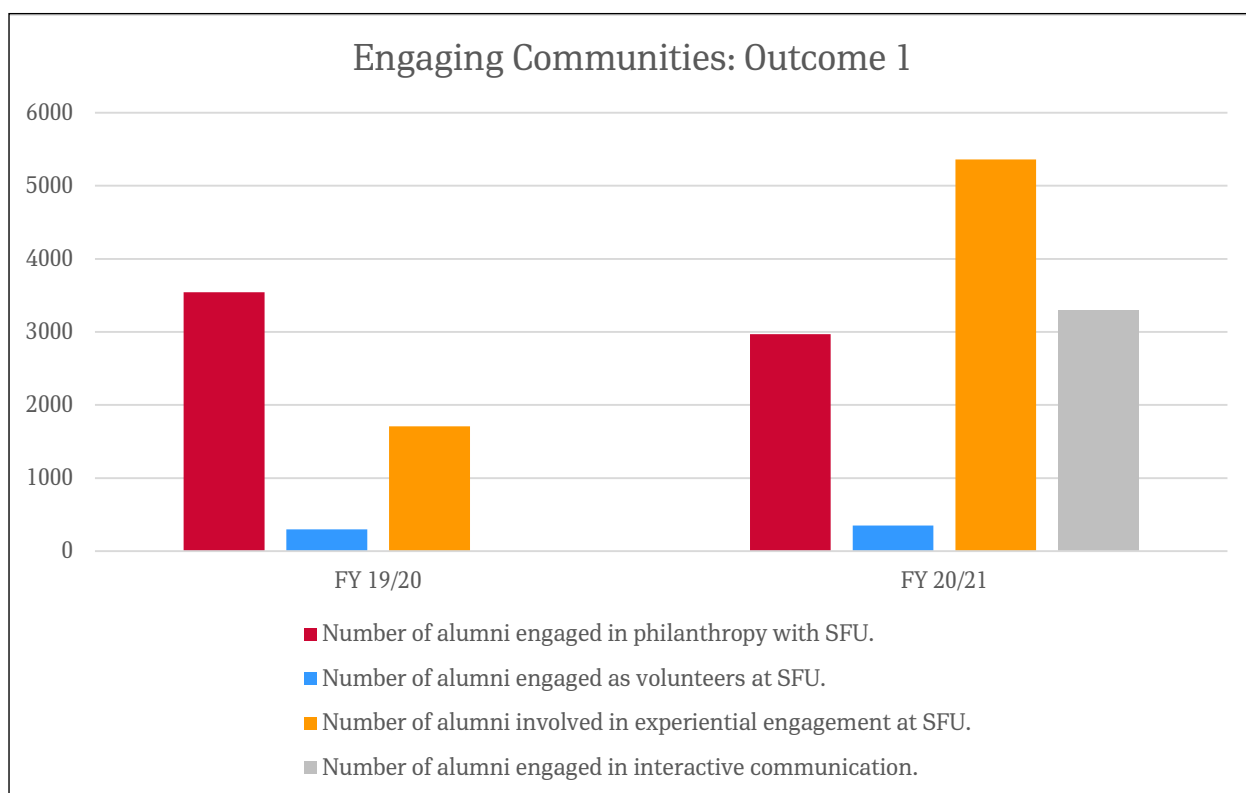
5.3 CORE THEME: ENGAGING COMMUNITIES

Goal: To be Canada's most community-engaged university.

Outcome 1 - SFU is Engaged with its Alumni

Indicators		FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	Assessment			Target for 2021
							Below Expectations	Meets Expectations	Exceeds Expectations	
1.1	Number of alumni engaged in philanthropy with SFU.			3544	2968	not available yet				-
1.2	Number of alumni engaged as volunteers at SFU.			298	351	not available yet				-
1.3	Number of alumni involved in experiential engagement at SFU.			1708	5361	not available yet				-
1.4	Number of alumni engaged in interactive communication.			n/a	3292	not available yet				-

5.15: Engaging Communities, Outcome 1



5.16: Engaging Communities, Outcome 1

Indicator 1.1-1.4 – Alumni Engagement

SFU Alumni Relations has recently aligned its data recording strategy to align with the [Council for Advancement and Support of Education](#) (CASE) alumni engagement metrics framework, which was introduced in 2018 and has been crafting definitions in partnership with institutions across the country and beyond. Since the launch of the CASE Alumni Engagement Metrics (AEM) survey back in 2018, institutions around the globe have submitted their alumni engagement data on a fiscal year basis. This allows schools to benchmark with one another under official definitions of engagement set by the CASE task force, and it will become the formal standardization of measuring alumni engagement in post-secondary institutions in the future. This includes measuring alumni engaging in any of these modes: Philanthropic, Volunteer, Experiential and Communication. With more than 3,700 CASE members, the Task Force recognizes there will likely be institutional nuances regarding terms and definitions. Institutions may apply the definitions as they deem appropriate to measure engagement. As such, SFU Alumni will continue to represent Simon Fraser University to participate in this survey submission exercise annually. SFU is confident that the move to adopting the CASE metrics will give the university the ability to accurately and effectively measure its alumni engagement in ways that were never available previously.

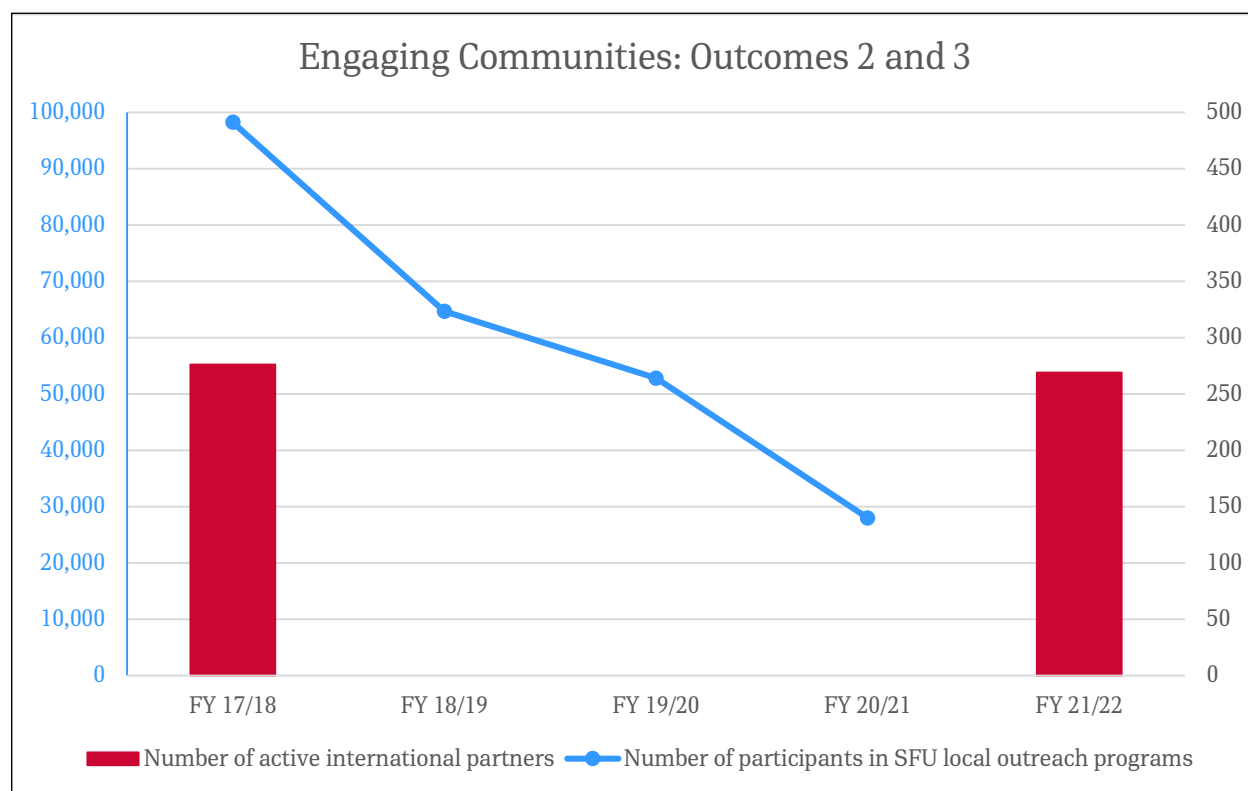
The 2021/22 numbers will be available April 2023. No targets have been set yet for this newly adopted indicator.



Outcomes 2 & 3 - SFU is Engaged Locally and Globally

Indicators		FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	Assessment			Target for 2021
							Below Expectations	Meets Expectations	Exceeds Expectations	
2.1	Number of participants in SFU local outreach programs	98,232	64,661	52,778	27,955	Not available yet	✓			100,000
3.1	Number of active international partners	276	not available	not available	not available	269	✓			280

5.17: Engaging Communities, Outcome 2 & 3



5.18: Engaging Communities, Outcome 2 & 3

Indicator 2.1 – Number of Participants in SFU Local Outreach Programs

The global pandemic had widespread impact on the ability for people to safely convene in-person. For months in 2020 and 2021 governments restricted people from spending time together, businesses and organizations severely modified processes, and social isolation was encouraged, and at times, was outright required. However, in 2020, SFU was able to convene more than half the number of participants in local outreach programs as that of the year before. Not reflected in SFU's 2020 totals was a substantial portion of the number of participants that were engaged via virtual and online participation. With virtual

participation included in the total, SFU would easily have surpassed the target of 100,000 participants in both 2020 and 2021. Across SFU, community-facing departments quickly shifted in-person community programs to offer online and virtual programs in their place. The swiftness and proficiency with which this happened across SFU is a testament to the university's conviction to embed community in its mission regardless of the circumstances encountered.



Indicator 3.1 – Number of Active International Partners

The COVID-19 pandemic created problems for SFU regarding its current methods of data collection for this indicator, which resulted in no data for 2018/19 to 2020/21. Because of this and other reasons, SFU International is investigating shifting from the current indicator to a multi-variable assessment of global engagement that reflects not only the number of international agreements, but also the number and variety of international activities, particularly with key partners, as indicators of engagement. This decision would be informed by SFU's International Engagement Strategy, and indicators would be derived from a range of data, including international student mobility numbers, number of international degree-seeking students, number of jointly organized events, global donor profile, engaged international alumni, number of joint research publications with international collaborators, number of international inquiries about SFU, etc.



Conclusion - Engaging Communities

SFU's strong vision to be a leading engaged university has helped raise the profile of community engagement work and has helped to differentiate SFU from its peers, giving SFU a competitive advantage in recruiting, developing partnerships, and securing funding. To maintain its status as a leading engaged university, SFU is actively adjusting its indicators to make them relevant and applicable. The recent adoption of the CASE alumni engagement metrics framework is a good example of this as well as the work currently being done to move to a more applicable method of tracking the university's international partners. Currently, the indicators for this theme are on course and moving in a positive direction as they support the continued growth and stability of SFU's community engagement practices and footprint.

Of particular note, since 2018, SFU has been the lead Canadian partner in piloting the U.S.-based [Carnegie Community Engagement Classification](#). This has involved leading a group of 16 Canadian post-secondary institutions in putting into practice the principles, values, and commitments of community campus partnerships and catalyzing opportunities for learning and research impact across Canada and beyond.

5.4 FUNDAMENTAL THEME: LEVERAGING INSTITUTIONAL STRENGTH

Goal: To become financially flexible through continuous improvement of administrative systems, strengthening of infrastructure, and recruitment and retention of the best people.

Outcome 1 - SFU is Financially Sound

Outcome 2 - SFU has IT Services that Support its Priorities

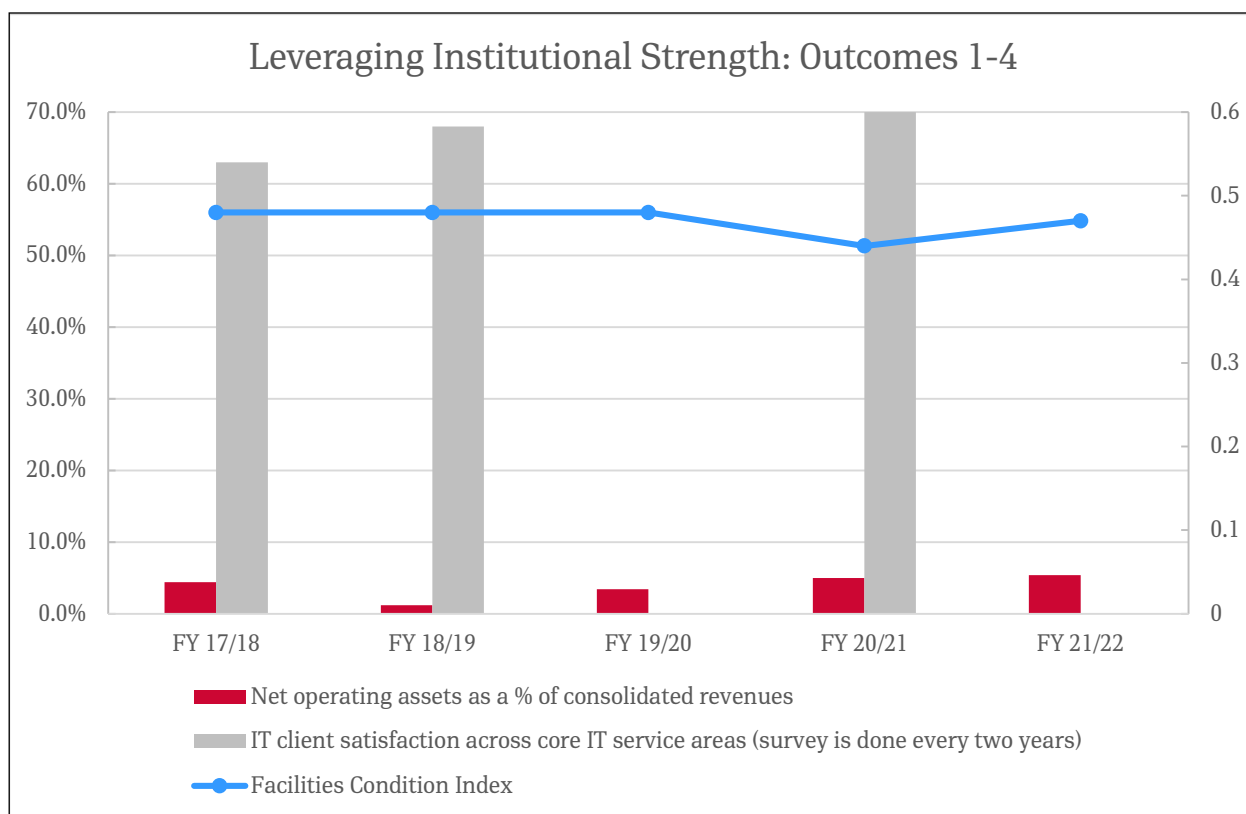
Outcome 3 - SFU Attracts and Retains the Best People

Outcome 4 - SFU has Facilities that Meet its Needs

Indicators		FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	Assessment			Target for 2021
							Below Expectations	Meets Expectations	Exceeds Expectations	
1.1	Net operating assets as a % of consolidated revenues	4.4%	1.2%	3.4%	5.0%	5.4%		✓		2.0%-9.0%
2.1	IT client satisfaction across core IT service areas (survey is done every two years)	63.0%	68.0%	n/a	70.0%	n/a			✓	67.0%
3.1	Canada's Top 100 Employers	Yes	Yes	Yes	Yes	Yes		✓		Yes
4.1	Facilities Condition Index	0.48	0.48	0.48	0.44	0.47	✓			0.48

5.19: Leveraging Institutional Strength, Outcomes 1-4





5.20: Leveraging Institutional Strength, Outcomes 1-4

Indicator 1.1 - Net Operating Assets as a Percentage of Consolidated Revenues

As can be seen above, this indicator has remained at an appropriate level over the past two years. The introduction of new public sector accounting standards led to a restatement of the indicator from fiscal years 2018 to 2022 to account for the deferral of April tuition fees for the spring semester, as it falls outside the fiscal year. The indicator has increased to the target range over the last two years. At the end of the 2021/22 fiscal year, net operating assets were \$46.4 million, representing 5.4% of consolidated revenue. The university uses the range of 4.0% to 9.0% to represent a reasonable level of operational reserves given that other factors, such as the university's operating contingency, also contribute to the overall financial health of the university.

Note: SFU's carry forward guidelines limit the level of cumulative carry forward in units, with a differentiated threshold of 7.0% of the operating budget for faculties and 4.0% for support units. Consistent with this guideline, and based on comparatives with other Canadian universities, a positive net operating asset balance of up to 9.0% of consolidated revenues represents a reasonable and appropriate balance of net operating assets.



Indicator 2.1 – IT Client Satisfaction Across Core IT Service Areas

As there is no industry standard single metric for the performance of IT services, SFU has considered various options for this indicator. Since 2018, SFU has been using surveys to assess IT client satisfaction across core IT service areas. To determine IT client satisfaction, the university has conducted this survey every two years. The latest survey conducted was in 2020/21. It showed an overall IT client satisfaction rating of 70.0%, a steady increase from 68.0% in 2018/19.

Indicator 3.1 - Canada's Top 100 Employers

SFU consistently ranks in the top 100 rankings of employers by [Mediacorp Canada](#), the country's leading employment periodicals publisher. Mediacorp assesses employers using eight criteria:

1. Physical workspace
2. Work atmosphere and social atmosphere
3. Health, financial, and family benefits
4. Vacation and time off
5. Employee communications
6. Performance management
7. Training and skills development
8. Community involvement

Employers are compared to other organizations in their field to determine which offers the most progressive and forward-thinking programs. SFU has been included in Mediacorp's list of Canada's Top 100 Employers every year since 2008, which reflects the university's ongoing commitment to its employees and its ability to provide them with a positive work environment and culture.

SFU was also named by Mediacorp as one of Canada's Top Family-Friendly Employers and British Columbia's Top Employers for 2018.

Indicator 4.1 - Facilities Condition Index

In 2012/13, SFU adopted the Facilities Condition Index (FCI) for all its campuses. FCI is an accepted industry metric utilized by most British Columbia post-secondary institutions for determining the relative condition of constructed assets at a specific point in time. It is the ratio of the cost of deferred maintenance and capital renewal to current replacement value. For example, an FCI of zero means that a building is brand new, while an FCI of 1.00 means that a building has no useful life left.

The last comprehensive FCI assessment was completed in 2021/22 and showed an increase from 0.44 to 0.47 from the previous review in 2020/21. The change in the index



is primarily due to an increased FCI of the university's academic buildings located at the Burnaby campus (the university has newer assets in the city centers of both Vancouver and Surrey). The 2018 FCI includes an additional year of building deterioration but does not reflect the efforts made to address the deferred maintenance needs. The university used the period during the pandemic when campuses were less busy to significantly ramp up its maintenance and capital programs. This led to major refurbishments and expansions of student residences, dining halls, the Academic Quadrangle, the Applied Sciences building, and others. Much of this work will not be reflected in the FCI until the projects are completed and new assessments are undertaken. With buildings having a total current replacement value of over \$2.0 billion, it is extremely difficult to make major shifts in the index.



Conclusion - Leveraging Institutional Strength

These measurements reflect SFU's overall financial strength, the strength of IT resources, the strength in human capital, and the condition of SFU's facilities. These indicators can drive where and how the university allocates resources. Based on the measurements for the documented five-year period, SFU is meeting its goals and objectives for this fundamental theme

6 STRATEGIC PLANS

ACADEMIC PLAN

The [2019-2024 Academic Plan](#) was created in consultation with the SFU community and builds on the academic plans developed by the Faculties. It outlines the strategies on which SFU needs to focus on to continue to be a leading engaged university and to be an active participant in the innovation and dialogue that shape our future.

In September 2020, the university released an [update](#) for the Academic Plan that focuses on the achievements attained in addressing the five challenges identified

in the plan. The update presents evidence that steady progress is being made across the five challenges. Some of the supporting activities identified have been in place for some time, while others are just getting established, but all are contributing to meeting and addressing the challenges. The update to the Academic Plan shows that SFU is achieving its vision/mission.

STRATEGIC RESEARCH PLAN

Since 2016, research at SFU has been supported by the [2016-2022 Strategic Research Plan](#). Built on the university's strengths and successes, this plan has helped position SFU as one of Canada's top research-intensive universities and has supported continued growth in both research income and research outputs.

The [Strategic Research Plan Progress Report](#) was published in January 2022. It provides updates on the work done to address the six research challenges identified in the Strategic Research Plan and the four research clusters that SFU has put in place to meet these challenges. Each research cluster has helped the university

to strengthen areas of research excellence, seamlessly connect SFU research to its partners, and increase the university's impact on the national and international stage.

After consulting extensively with the SFU community, the first working draft of a new [2023-2028 Strategic Research Plan](#) and its implementation plan has been published to solicit feed back from the community.



STRATEGIC COMMUNITY ENGAGEMENT PLAN

SFU's [Strategic Community Engagement Plan](#) intends to empower SFU students, faculty, and staff to form deeper and more courageous partnerships so that community-engaged teaching, research, and creative activity may better express co-created intentions for community impact while maintaining scholarly rigour.

In March 2022, the Office of Community Engagement published an [aggregated report](#), compiling findings from several community engagement reports and reviews, initiatives, and consultations. The report presents the themes, findings, and recommendations that appear consistently across the various initiatives and studies that make up the Strategic Community

Engagement Plan. The report summarizes the impact of the university's engagement work and provides recommendations to increase its community engagement footprint and impact.

The aggregated report provides a thorough review of, and update to, the Community Engagement Plan, describing a vision for the practice of community engagement that seeks opportunities to address critical societal issues and complex challenges through principled, accountable, and responsive collaboration and partnership. The Community Engagement Plan and the aggregated report prove that SFU is fulfilling its vision/mission to be a leading engaged University.

7 INSTITUTIONAL ACCOUNTABILITY PLAN AND REPORT

Post-secondary institutions in British Columbia provide strategic plans and progress updates to the provincial government annually through an [Institutional Accountability Plan and Report](#) (IAPR). The purpose of the IAPR is two-fold:

1. To ensure individual public post-secondary institutions are accountable to government, their boards and students, and the public for their performance related to ensuring students receive quality educational opportunities relevant to their needs and the needs of the labour market.
2. To ensure the Ministry is accountable to the public for the performance of the public post-secondary education

system in BC, with the aim that it should benefit all residents of the province by ensuring the system's ongoing contribution to social and economic development.

All BC post-secondary institutions must report publicly on how they are meeting the five strategic objectives of the Ministry, which are: Capacity, Access, Efficiency, Quality, and Relevance. A set of 16 performance measures related to the five strategic objectives have been developed and all institutions are evaluated by the Ministry to determine if they have achieved, substantially achieved, or not achieved the Ministry-set target for each of the performance measures. The finalized and approved report is published on both the SFU and Ministry websites.



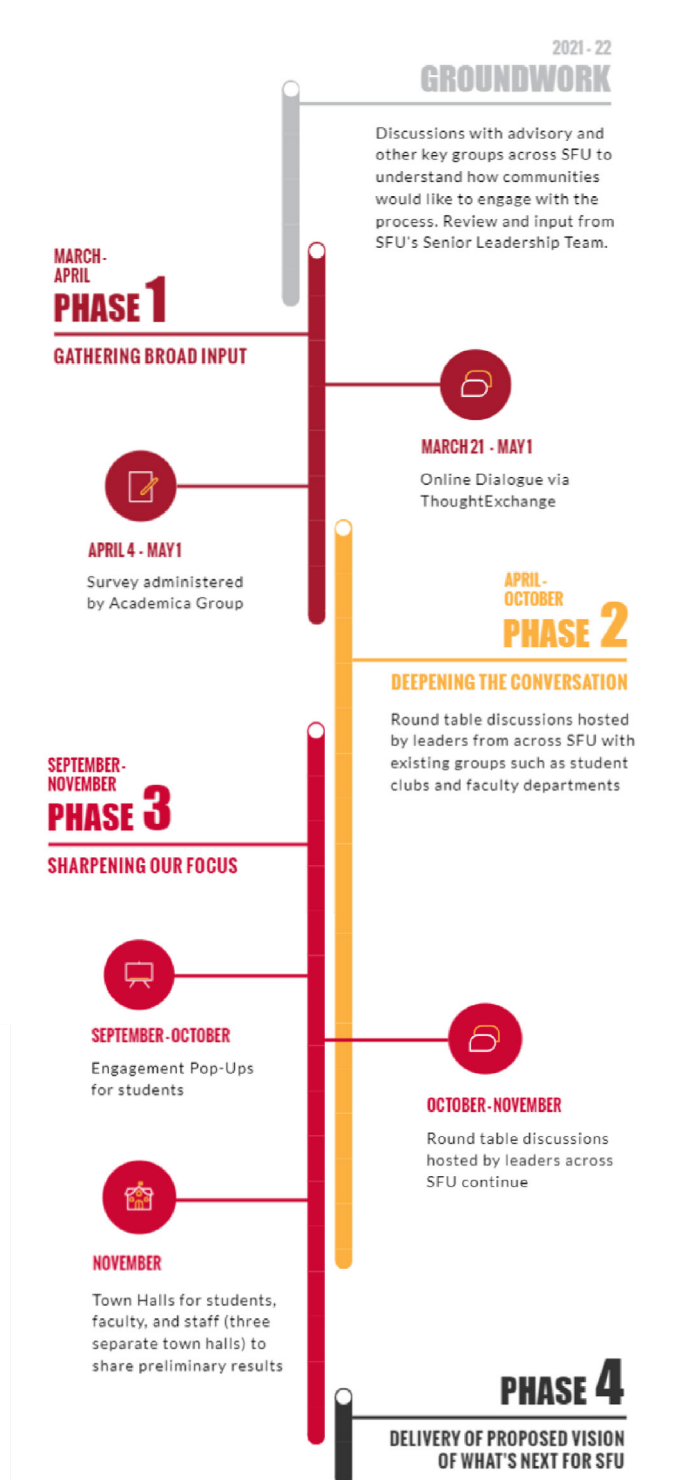
In its [2022 IAPR](#), SFU was required by the Ministry to report on nine of the sixteen performance measures. SFU achieved its targets on eight of those measures and substantially achieved its target on one, which shows that SFU is meeting Ministry expectations. This is a testament

to SFU's strong commitment to its strategic planning, which is based on not only on achieving the university's vision/mission, but also on achieving the goals and expectations of the Ministry of Advanced Education Skills and Training and the general public.

2021-22 Performance Reflected by Ministry Measures			
Ministry Performance Measures	Achieved	Substantially Achieved	Not Achieved
Student Spaces	✓		
Credentials Awarded	✓		
Indigenous Student Spaces	✓		
Student Satisfaction with Education	✓		
Student Assessment of the Quality of Instruction	✓		
Student Assessment of Skill Development	✓		
Student Assessment of the Usefulness of Knowledge and Skills in Performing Job		✓	
Unemployment Rate of Alumni	✓		
Sponsored Research Funding	✓		

8 SFU: WHAT'S NEXT?

[SFU: What's Next?](#) is a cross-university collaboration led by SFU President Joy Johnson and sponsored by the SFU senior leadership team of vice-presidents, deans, and associate vice-presidents. The goal of the campaign is to develop a framework that aligns efforts across the university for the next five years, expounding on SFU's vision/mission, purpose, priorities, and commitments. The SFU: What's Next? initiative has been designed to invite collaboration across the university with input from all levels of faculty, staff, students, alumni, and administration. The campaign began in March 2022 and will conclude in early 2023 with the delivery of a proposed vision/mission of "What's Next" for SFU.



9 CONCLUSION

SFU has been committed to its current vision/mission since its adoption in 2012, working tirelessly throughout this time to increase its national and international presence to become a premiere engaged university. The annual Maclean's university rankings (generally regarded as the foremost post-secondary ranking authority in Canada) has named SFU the top comprehensive university in Canada in 13 of the last 14 years. International rankings such as the QS World University Rankings, Times Higher Education, and Re\$earch Infosource also look upon SFU favourably with respectably high rankings. SFU is proud of what it has accomplished with its current vision, but the university also wants to remain relevant and adaptable. The current SFU: What's Next? initiative was launched in 2022 to do just this.



As SFU looks toward the future, it wants to maintain and build upon its reputation as an engaged university. The SFU: What's Next? initiative, much like the initiative launched over a decade ago that resulted in the current SFU vision/mission, is looking to the community for direction. The initiative is wide in scope and extremely consultative. Its anticipated completion date is spring 2023. Because of this, the 2022 Strategic Review, although goal and target driven, does not contain future targets. Targets will be assigned after the SFU: What's Next? initiative has been completed and an updated vision/mission is adopted and the objective is identified.

The 2022 Strategic Review has determined that the goals and indicators for each of SFU's core themes are reasonable and provide a consolidated measurement reflecting SFU's vision/mission fulfillment. Other than the identified COVID-affected measurements, SFU reached its targets for its indicators of achievement. Based on the overall assessment found in this report, SFU is confident that all objectives and outcomes of the current vision/mission are being achieved. Therefore, SFU can positively claim it is fulfilling its vision/mission.

SFU

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